

# Submission Process Instructions (The Appulate System)

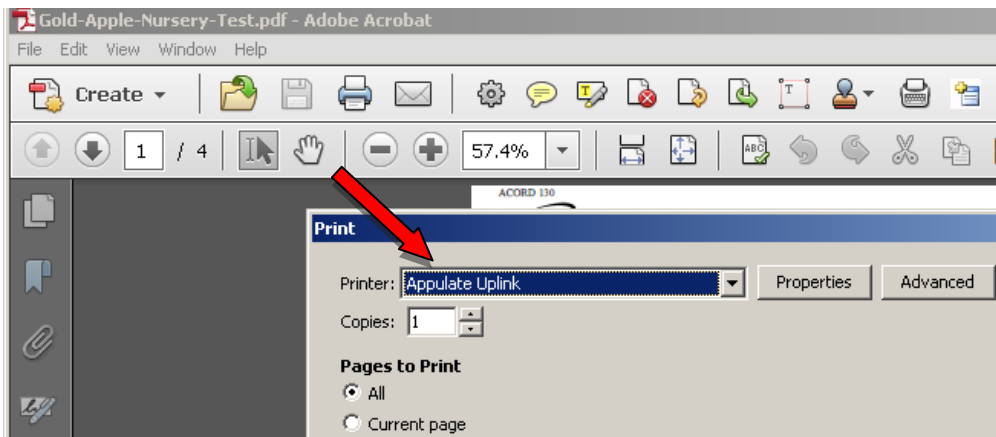
These instructions are for agents already registered with Appulate. If you are not registered, see our Appulate – Agent Setup Instructions or go to <http://www.statefundfirst.com/#submissions> and click on the “New User? Register” button towards the bottom of the page on the right.

To **upload** a submission **from your Agency Management System**, follow the instructions below.

To view instructions on how to **key in submission information directly** into the Appulate system, see our Appulate – Submission Instructions – SFF Agent-manually.docx document.

**\*Before you begin, you will need to have the Appulate Uplink downloaded onto your computer. For instructions on how to do that, go to page 7 of these instructions. If you have already downloaded the Uplink tool, begin here at 1.\***

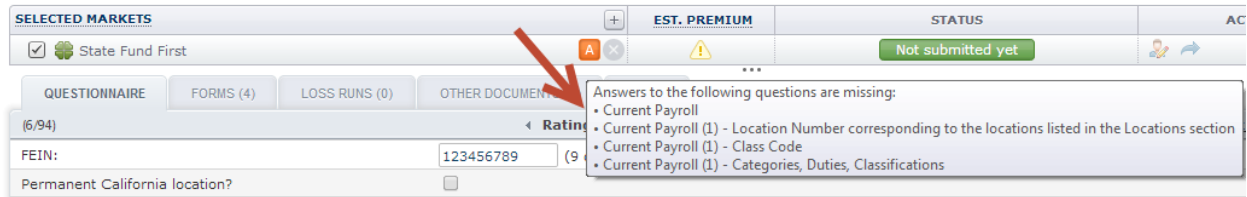
1. Prepare a completed Acord application to print from either your agency management system or from a PDF document. Choose the “Appulate Uplink” option from your list of printers. For Pages to Print, choose pages 1-4 (it will only carry over the first 4 pages of the Acord app). (You must have already downloaded the “Uplink” tool from Appulate.com. If you have not, please review the registration instructions document above for directions on how to do this.)



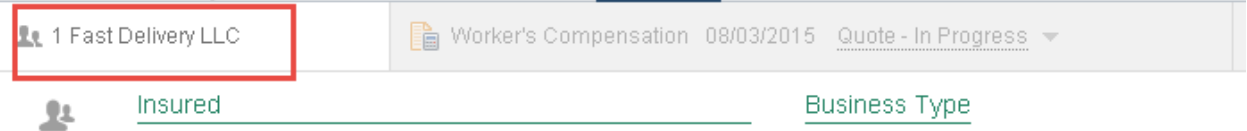
2. Click “Print”. This will bring you to the Appulate Uplink Log-in screen. Enter your Appulate email and password and select “Send”. Once you have entered your password once, the next time you use Uplink you can simply select “Send”.



- The information from your Acord application will be pre-populated into the StateFund First submission portal. You will see the following screen. Make sure that the “Selected Markets” is checked for State Fund First. If you hover your mouse over the orange “A”, you will get a list of missing information that needs to be completed before submitting to StateFund First.



- Click on the “Insured” tab where it displays the clients name to start from the first page, here you will review and make sure that the initial details carried over from your Acord app are correct, click continue to review the Policy tab as well. Afterwards, click on the “Worker’s Compo get into to the Q&A page.



- This first section will be the “Rating” section as shown below. Each of the 4 sections will have subcategories that can be clicked on to expand the area.

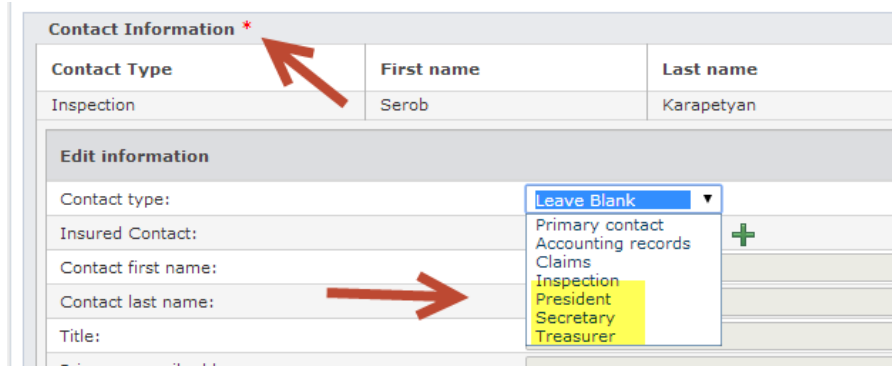
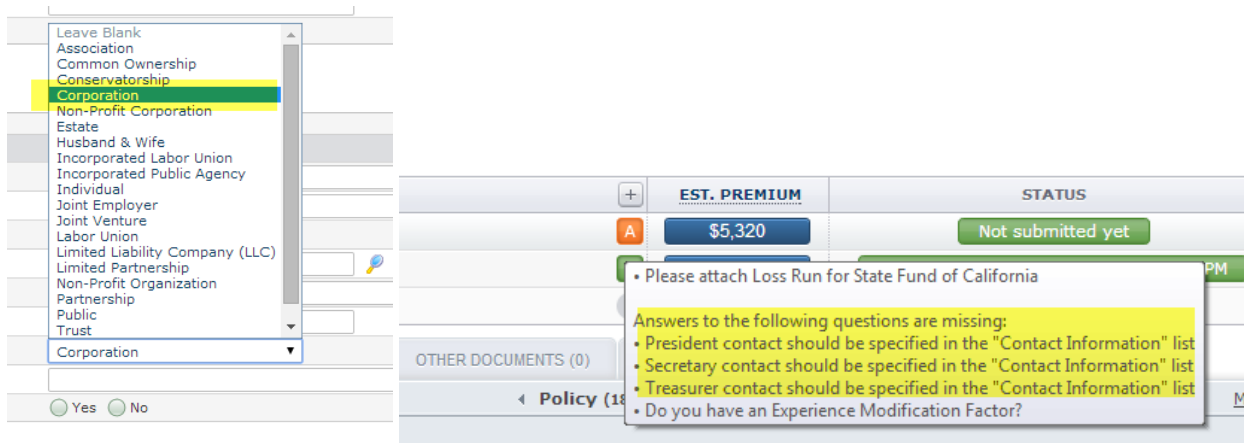


[Continue »](#)

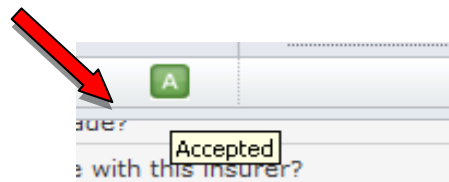
6. Once you have reviewed each subsection in the Rating tab, click [Continue »](#) to go the next section. If you are prevented from going to the next section, check for questions marked with a red asterisk. These are required fields and must be completed to get to the next section.

[Continue »](#)

7. Continue to click [Continue »](#) to get to each section.
8. Contact Info – If you choose Corporation as the entity, the following page will require you to input the President, Secretary, & Treasurer in the “Contact Info” area. You will need to go click “Add New” from the right and choose the Contact Type (each of them) and then add in the corresponding person who is showing as the President, Secretary, & Treasurer.



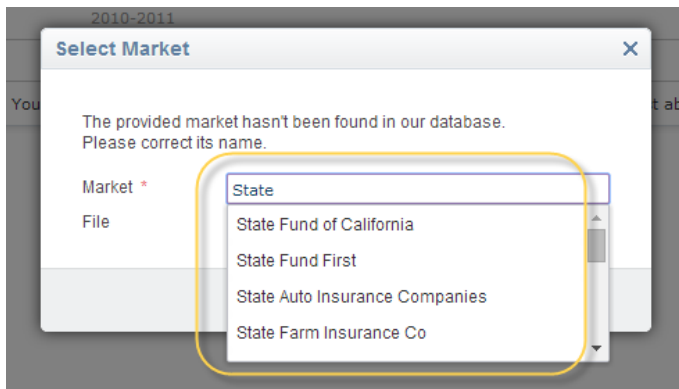
9. Once all required fields are completed, you will see that the “A” at the top of the screen is now green. If you move your mouse over the “A”, it will show the submission as “Accepted”.



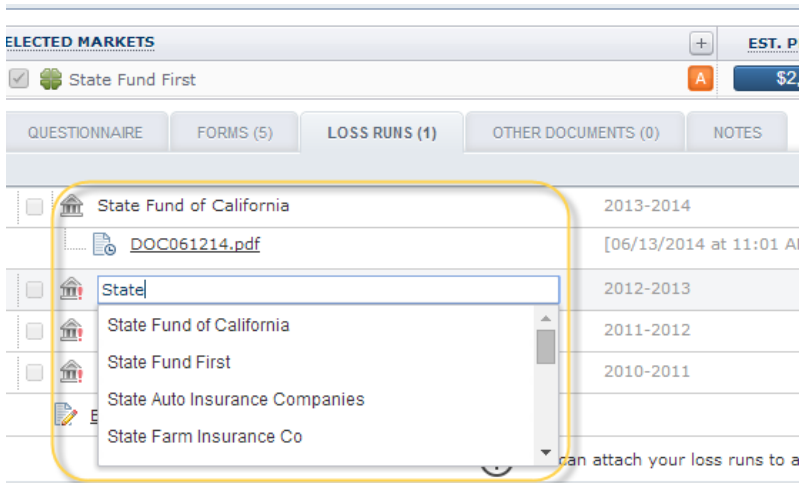
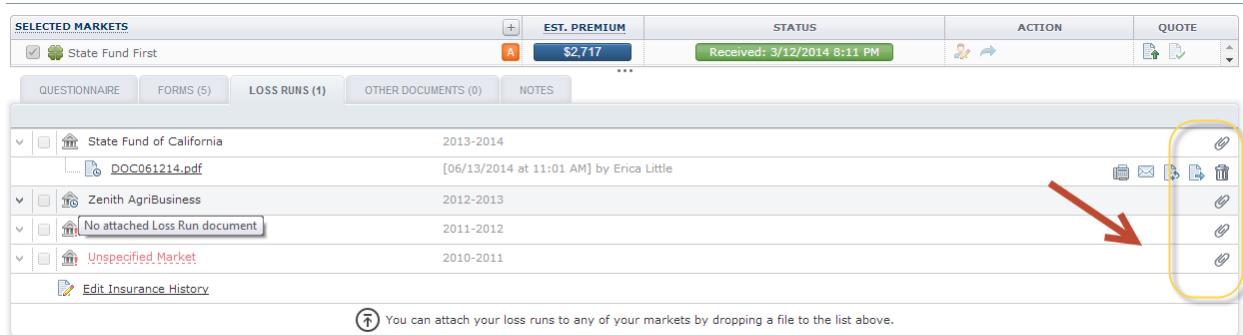
10. To add an attachment such as loss runs, click on the “Loss Runs” tab on the left. Then click on the paperclip icon to attach your document. If the carrier’s name isn’t input correctly you will see “Market Not Found” and you will have to edit the company first before it will allow you to save. You will now be able to upload your document where you have them saved to on your computer. You can attach other documents like X-Mods, NOC, etc. to the “Other Documents” area.



## Carrier Not Showing: IT will display “Market Not Found”

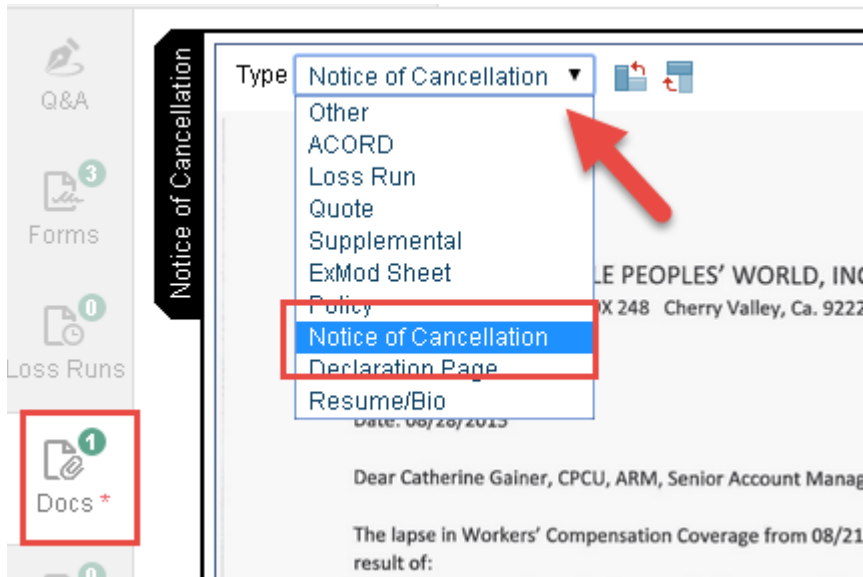


To Edit: click on the series of dots under the company name. When you start to edit the name, a drop down menu will appear. In the above example, the carrier is written as SCIF. This needs to be corrected by typing in and selecting State Fund of California.

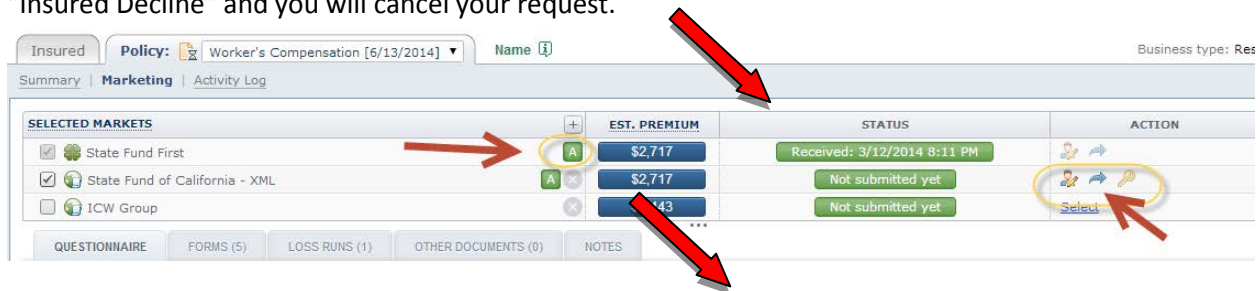


**Please note: The State Fund requires loss runs to be included at submission.**

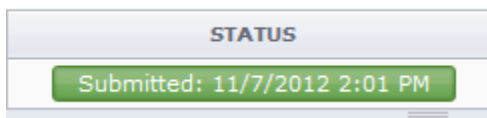
11. Notice of Cancellation or non-renewals are also required for a complete submission. Attach NOCs to the “Docs” section also located to the left under Loss Runs.



12. To submit to StateFund First, select "Submit" at the top under "Action" or from the "Questionnaire" tab, select "submit". Do not click "Submit" a second time. After the submission has been submitted, the button changes to "Insured Decline" and you will cancel your request.



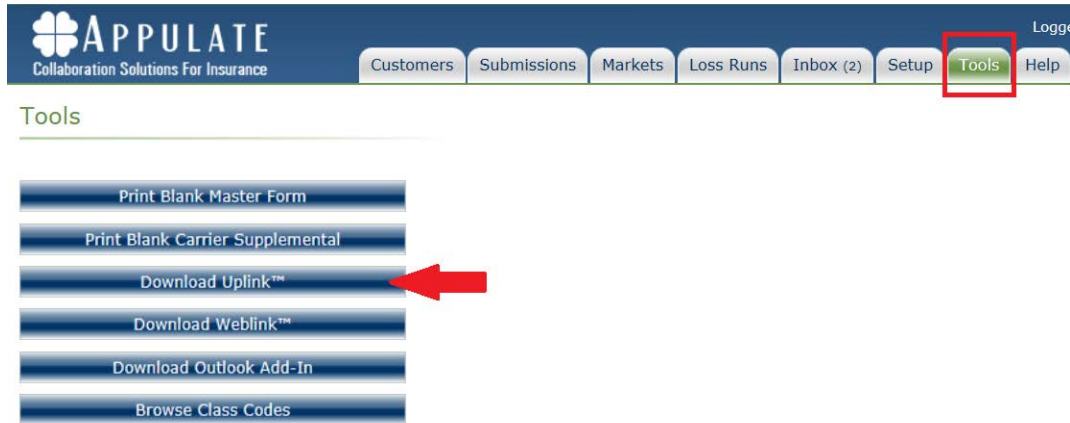
13. You will see confirmation under status that the account was submitted.



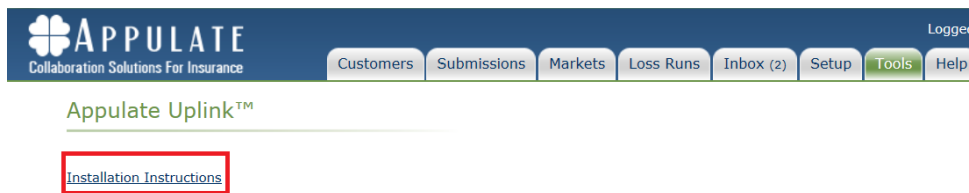
That's it! Your submission has been sent to StateFund First. You will receive an email from StateFund First within 24 hours, confirming receipt and letting you know who your primary contact is.

## Instructions for Downloading the Appulate Uplink program

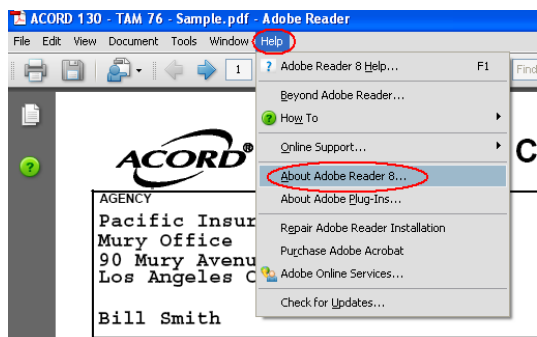
1. Log into <https://sff.appulate.com/accounting/loginpage.aspx> using your agency email and password. (This can be accessed from our website under Submissions – Log In) Once in Appulate, click to the Tools tab at the top of your page and click on Download Uplink:



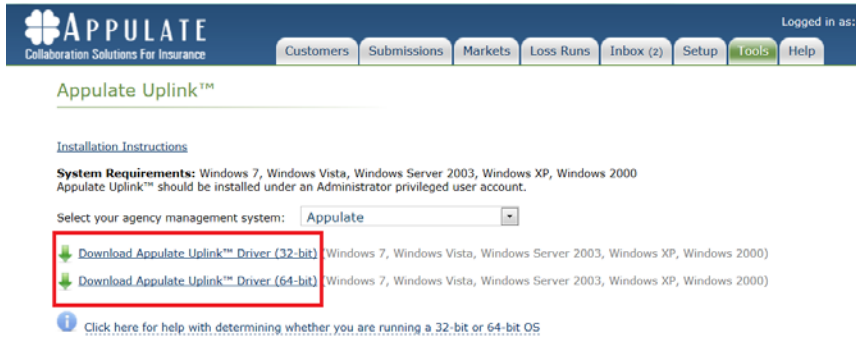
2. Click on Installation Instructions that will determine your installation type based on your network setup.



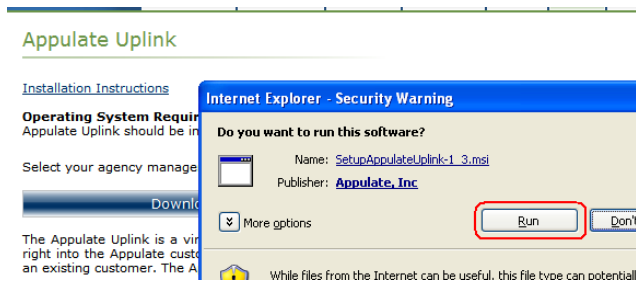
3. Choose your agency management system from the list. If your system is not listed choose “Other”.  
[Note]: You can find what version of your agency management system you’re using by going back to your agency management system and choosing the “About [agency management system name]” option from the “Help” menu. Like this example for Adobe Reader:



4. Click the “Download” button, and then click “Run” when the box pops up.



5. The download will start and when it is finished click “Run” again in the box that pops up.



6. After you click “Run” again, follow the instructions through the installation process. After the installation program completes you are finished with setup!